

LEGAL MANAGEMENT

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How to Support Co-Workers Through Trauma

Demonstrate empathy and active listening to foster support
and understanding.





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“
[Here We Go.] These three simple words encapsulate the spirit of our journey ahead. They remind us that we are ready and willing to take on whatever challenges come our way.”

Here We Go

Last month, I was honored to become this Association's 50th President. The magnitude of this has not been lost on me, and I've spent a lot of time reflecting on where this Association has been, while dreaming about what it has yet to become. After I took the gavel at the Association Luncheon, I shared both my ALA journey as well as my vision for our future.

My journey with ALA began many years ago, as a wide-eyed attendee at my first Annual Conference in San Francisco back in 2005. I remember sitting in the audience during the Association Luncheon, watching the president address the crowd, and thinking to myself, “Well, that will never be me.” Mostly, because I never imagined I would still be working for lawyers after all these years.

Fast forward almost 20 years and our Association stands at a pivotal moment in its history. When I joined the Board of Directors at the close of 2020, we faced challenges that mirrored those confronting the world at large. With determination, we charted a strategic course spanning from 2021 to 2023, fueled by ambitious goals and a steadfast commitment to success.

Now, as I embark on my presidential term, ALA finds itself in a position of strength and vitality. With an Executive Director boasting decades of experience in steering professional associations, supported by a Headquarters Executive Management Team comprised of top-tier talent across all departments, our organization is poised for greatness. We have revitalized our Strategic Direction and allocated resources to execute its tactics with precision and purpose. As we roll out a new volunteer structure aligned with our strategic objectives, our current and incoming volunteer leaders stand ready, eager and energized to propel our Association boldly into the future.

Every year, your Association leaders gather at an event called the Association Leadership Institute (ALI) where we plan for our year ahead. As President-Elect, I was responsible for planning this year's event. I had a theme (because ALA LOVES a theme) that was titled, “Oh, The Places We'll Go,” inspired by Dr. Seuss. I opened that meeting talking about all

ALA has been through in the past few years and what we have overcome. I energized our leaders by focusing on what comes next for ALA and reiterated that the sky is the limit because the foundation is solid.

I ended that meeting with three simple words: Here We Go.

Yet, as amazing as that weekend was with a flash mob, costumes, decorations and presentations presented in rhyme (ALA REALLY loves a theme), we could not and we cannot ignore the elephant in the room — decreased member engagement across some facets of our organization. In a world shaped by digital connections and shifting priorities, members' needs have evolved, particularly the younger generations who are joining now. The landscape of engagement is changing, and it is essential that we adapt accordingly.

Our membership now includes Zoomers, and Generation Alpha is following closely behind. They each approach engagement with professional associations differently than previous generations. They are digital natives, fluent in the language of technology and social media. For them, networking may take place on Discord chats or through virtual meetings rather than traditional face-to-face interactions. As professionals, they prioritize efficiency and convenience, seeking out virtual channels for learning and networking opportunities.

So, what can we do to increase and enhance member engagement in this rapidly changing environment? First and foremost, we must meet our members where they are. This means embracing digital platforms, leveraging social media channels and offering events and resources that cater to their preferences and needs. By providing flexible and accessible options for engagement, we can ensure that all members feel included and valued within our Association. Our Association has historically been very good at making members feel included and valued. ALA is where I go to be lifted up and encouraged, so I feel confident when I say, "Here We Go."

We must continue to cultivate a sense of community and belonging among our members — both online and offline. This includes supporting mentorship programs like the one overseen by our newly created Member Ambassador Committee, facilitating peer-to-peer networking opportunities, and creating spaces for open dialogue and collaboration. By building strong relationships and meaningful connections within our Association, we can enhance member satisfaction and loyalty, ultimately driving greater engagement and participation.

Recently ALA's Board of Directors adopted a new vision for the Association: Creating Excellence. Driving Innovation. Empowering Leaders in Law. These are not mere words but guiding principles that will shape our actions and initiatives in the coming years. We must strive to make our organization more accessible while upholding our stellar reputation within the legal community.

But the Board and headquarters staff cannot achieve this vision alone. Each and every one of you plays a crucial role in the success of our Association. I challenge you to ask yourselves: "What can I do to push ALA forward? How can I increase engagement both within myself and among those around me?"

It's time to rally together, to bring others into the fold and to pioneer a new adventure. ALA still needs piano bars, themed parties and friends that become family. But we also need to innovate our approach to fostering connections, create new and unique educational opportunities, and lean into emerging technologies. We have the strategic direction, a dedicated team of volunteer leaders alongside our professional leadership at HQ, and we have allocated resources to do just that.

So, Here We Go.

These three simple words encapsulate the spirit of our journey ahead. They remind us that we are ready and willing to take on whatever challenges come our way. Together, we can overcome obstacles, seize opportunities and make a lasting impact on the legal profession. ALA was founded in 1971. Our bylaws were written on a typewriter, and today this article was edited by AI. Some of our members weren't alive when 9/11 happened. Google and smartphones are both closing in on 30 years old. (Yes, I know this is supposed to be lifting us up. I'll go back to the positivity.)

So, my friends, let us embrace the journey that lies ahead with courage, determination, and a steadfast commitment to our shared mission and vision. Together, we are the next generation of ALA — one which will continue to be marked by excellence, innovation and unwavering leadership in law.

Thus, the Adventure Begins. Here. We. Go.



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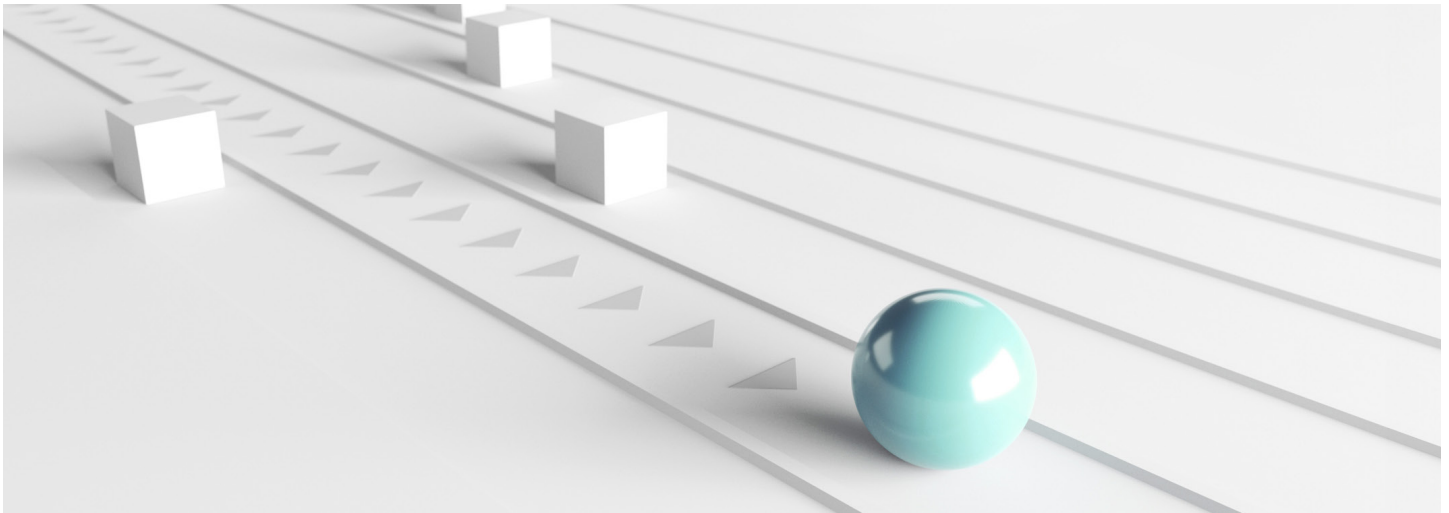
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STEVEN COLSON, CIC
*Professional Liability Practice Leader
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“Simple gestures like inquiring about an employee’s family or personal events — coupled with holding individuals accountable without resorting to blame — contribute to fostering a culture of trust and accountability.”

How Making Bosses Better Can Solve Many Law Firm Issues

The productivity puzzle remains a central concern within U.S. law firms, despite a notable 7.3% revenue surge in 2023, fueled by increased billing rates and demand.

New research from Thomson Reuters and Georgetown Law indicates that productivity losses have somewhat dampened profitability. While factors like the disparity between lawyer numbers and demand growth are often cited, one critical aspect often overlooked is the effectiveness of managers and leaders.

Perhaps it’s time to ponder this aspect, particularly as it intertwines with prevalent issues such as high turnover rates. In 2023, law firms grappled with an associate turnover rate nearing 25%, with Thomson Reuters forecasting a staggering 100% turnover within the next five years. Alarmingly, 60% of associates feel that efforts to retain them are lacking.

THE POWER OF EFFECTIVE LEADERSHIP

It’s universally acknowledged that managers play a pivotal role in shaping organizational culture and success, determining whether top talent is attracted, engaged and retained — or if they seek opportunities elsewhere. Effective bosses comprehend how to elicit more from their teams, fostering engagement through tangible investments in workforce capabilities. Notably, they allocate 2.6 times more resources to intangibles like workforce development than their less effective counterparts, resulting in enhanced productivity and overall performance.

However, the challenge lies in cultivating better and more effective managers and leaders, a task that is neither easy nor quick. Nevertheless, the long-term benefits are undeniable. Firms can initiate this process by identifying the qualities that define effective leadership and moving beyond simplistic solutions to instill enduring and impactful change.

DISTINGUISHING BEHAVIORS FROM SKILLS

It's reasonable to expect that those ascending through management ranks in legal firms possess both soft (transferable) and technical skills. On one hand, there are skills like public speaking and clear, concise writing, coupled with proficiency in legal tools and practices. On the other, there are behaviors, encompassing interpersonal interactions in various contexts.

Skills can be developed and refined over time, while behaviors, more intricate in nature, demand a concerted effort to change. This entails disrupting existing habits while nurturing new ones, grounded in genuine interpersonal connections. Simple gestures like inquiring about an employee's family or personal events — coupled with holding individuals accountable without resorting to blame — contribute to fostering a culture of trust and accountability.

COACHING AND LEADERSHIP ATTRIBUTES

Effective coaching, distinct from mere advice or mentoring, plays a pivotal role in guiding managers through the complexities of behavioral change. It involves facilitating self-reflection to unearth authentic leadership styles, prompting managers to confront their potential and the behaviors hindering

their progress. Courage, humility and discipline emerge as indispensable traits, as advocated by executive coach Marshall Goldsmith.

Managers committed to personal and organizational improvement embrace these characteristics:

- » Courage to solicit and act on feedback
- » Humility to acknowledge areas for improvement
- » Discipline to undertake the necessary work for growth

Organizations that recognize the significance of leadership development and remain steadfast in their efforts are poised to cultivate highly engaged employees, mitigate turnover and bolster productivity.

ABOUT THE AUTHOR

Steven Colson, CIC, is the Practice Leader and Senior Vice President for HUB International Northwest's Professional Liability Practice for Lawyers. He has more than 20 years of experience designing customized insurance and risk management programs.

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Chief Executive Officer
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How LinkedIn Can Be Your Most Effective Business Development Tool

Imagine a big networking event filled with your firm’s best clients. Some are mingling and greeting the attorneys and other clients, some are starting a conversation about the hot topics in their industry, and others are pulling your attorneys aside, looking for guidance and ideas. This fabulous networking event isn’t in a hotel ballroom — it’s LinkedIn.

“LinkedIn can be highly effective and helpful for attorneys and legal staff looking to bring in new business, engage with current clients and share their expertise with a broader audience.”

The synergy between LinkedIn’s platform and an attorney’s goal of sharing expertise that positions them to be the counsel and trusted adviser clients are looking for makes the platform an important tool to consider for a professional’s practice growth goals. Through meaningful interaction between platform users, content can support the reputation of attorneys and the law firm and further the reach of your expertise with clients (and prospects). LinkedIn can be highly effective and helpful for attorneys and legal staff looking to bring in new business, engage with current clients and share their expertise with a broader audience.

IT’S EFFICIENT

According to data from the 13th Annual B2B Content Marketing survey conducted by the Content Marketing Institute, 21% of business-to-business content marketers found LinkedIn extremely effective (with other social media channels all below 9% in the same category). Even better, 93% found it at least somewhat effective. Given the focus on keeping business development and the creation of thought leadership effective and efficient, LinkedIn is a win-win for lawyers and firms.

1. Creating posts is more accessible than writing long-form journal articles, scheduling and preparing a webinar, or traveling to a conference. While each of these other activities is worthwhile, LinkedIn content is more accessible through a busy day.

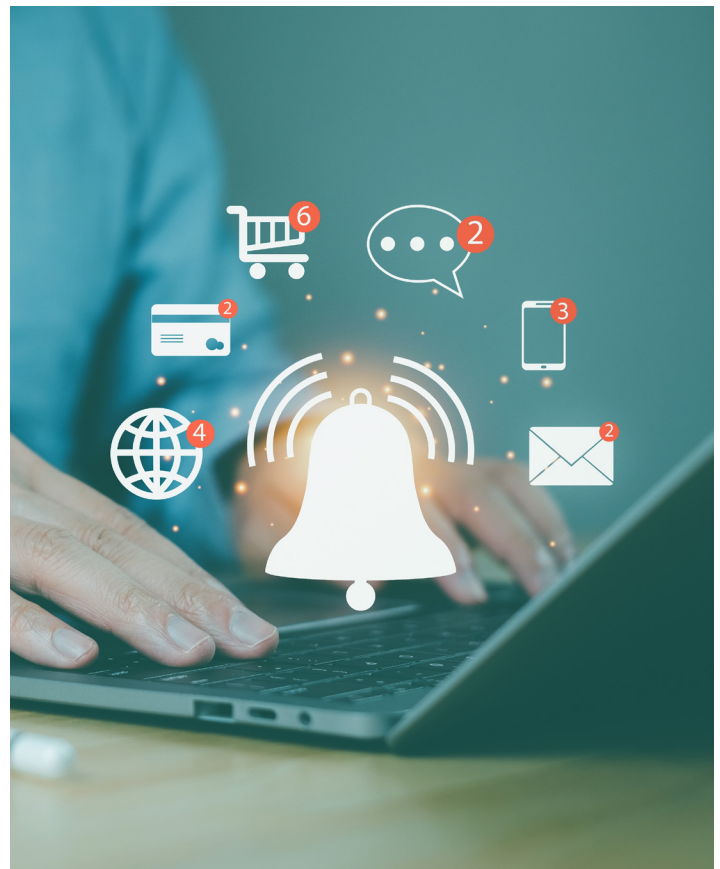
- 2. Content can be repurposed for other thought leadership opportunities (see the list above), allowing attorneys or legal marketers to share more information over time. In addition, testing the content on LinkedIn makes the webinars, panel discussions and keynotes more informed by the feedback and conversations driven from the short-form content.
- 3. Embracing a culture that celebrates and recognizes each other's accomplishments allows the accolades to not feel like a glossy announcement and instead showcase the collaborative nature of your entire team. Attorneys and firms can cross-share posts and updates, allowing for an even farther reach of the content and expertise.
- 4. LinkedIn is an excellent place to test content, given the strong presence of professionals, businesses and decision-makers. Using LinkedIn posts to ask appropriate questions and engage with a post allows firms and attorneys to understand the perspective of clients.

ENCOURAGE ENGAGEMENT

Engaging on LinkedIn is important for lead generation and bringing additional clients, or more projects, into the firm's pipeline. LinkedIn is 277% more effective in creating leads than Facebook or Twitter. Putting that in perspective, since LinkedIn is a platform where professionals engage with other professionals and seek to showcase their knowledge and business focus, the social media site is the perfect place to drive the next meaningful conversation for every level of your firm.

Creating meaningful content that generates new business can be simple. Here are a few ideas to support attorney engagement on LinkedIn:

- 1. Encourage attorneys to share their insight on client alerts and industry news. Going one step further than reposting the firm's alerts allows clients to understand the attorney's expertise and get the more detailed update they need.
- 2. Attorneys should accept client connection requests and follow updates from their clients and organizations by selecting the proper notifications. This allows attorneys to offer congratulations when news happens and stay on top of clients' updates and announcements.
- 3. Active engagement on the platform reminds clients of the attorneys' knowledge and expertise, especially as it changes over time. It is also a great way to highlight the capabilities of firm colleagues, fostering the possibility of introductions and cross-selling between attorneys. LinkedIn is often a good reminder of the resources in a client's network, and a simple way to remain top of mind for when they need to seek advice and counsel.



- 4. Showcasing the whole firm's approach to staying on top of news and industry alerts helps boost the professional presence of attorneys and the firm's profile as experts in the field. Deciding to engage with legal updates and news allows your attorneys to be in the center of discussions as they unfold.

One of the cornerstones to creating and growing a healthy book of business is showcasing the expertise and experience of your entire team. Using the organic post feature of LinkedIn is an efficient, effective and low-cost option for firms of any size to implement and see results. Encouraging attorneys to continue expanding their network, engaging with content and sharing their own makes LinkedIn an important tool in the firm's business strategy.

ABOUT THE AUTHOR

Deb Feder, Chief Executive Officer of Feder Development, LLC, is a business growth coach and strategist focused on helping lawyers and leaders build outstanding careers. Prior to founding Feder Development, Feder practiced corporate law for 15 years. She is the author of *After Hello: How to Build a Book of Business, One Conversation at a Time*.

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GARY G. ALLEN, Esq.
Founder and Head of Operations
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Turning Reluctance into Change: Top Tips for Getting Buy-In at Your Firm

This column is adapted from the author's book, *The Linchpin*. This content focuses on Angela Richardson, a fictional legal administrator, fighting to transform a stagnant, hierarchical law firm culture into a thriving, collaborative environment. Earlier in the book, Angela comes to understand the need for change in the firm at a deeply personal level.

“
At the end of the day, it's all about building trust. The lawyers want to practice law. If you can gain their trust on the business side, they will defer to you one day.”

Everyone knows when Horace Nelson, the firm's founding partner, is in the office. His voice has an unapologetically gritty timbre, and it penetrates every corner, punctuated by creative epithets that only the son of a forklift operator could conjure. It seems like he is always talking, until he stops and stares at you, standing 6 feet, 4 inches with a steely, blue-eyed gaze. In the courtroom, countless witnesses have wilted before this visage, and it is no different in the office. The staff react to him as if he were a hungry lion escaped from the zoo.

Angela knows the road to change goes through Horace. His son Atticus may be the managing partner now, but Horace's force of personality makes him the real power. And Horace hates change. He is rightly proud of what he has built and shows no interest in modernizing the firm.

After meeting with her confidant Marcia, whom she met through the Association of Legal Administrators, Angela develops an idea to begin moving key computer applications in the firm to the cloud, starting with transitioning from an old server-based version of Microsoft Office to MS 365.

Angela's steps echo in the hallway as she screws up her courage and approaches Horace's office. "Horace, can we discuss something that could significantly benefit the firm?"

Angela begins, standing at Horace's door, surrounded by the symbols of the firm and his personal achievements. Horace bellows, "I know! How about somebody, besides me, bills some hours?"

Horace listens to Angela's proposal with a blend of skepticism and impatience. "Angela, this firm has thrived on the foundation I established from the beginning. We just have to be great at winning cases and everything flows from that. These technologies you're pushing — they're not for us. We've been successful without them." He dismisses the idea with an icy glance that leaves no doubt the conversation is over.

Feeling disheartened but not ready to give up, Angela again seeks Marcia's counsel. After hearing the story, Marcia says, "Friend, I feel for you. I have raised my head many times to propose new initiatives, only to have it nearly bitten off. There is nothing more difficult in my job than change management. Over the years, however, I've learned some techniques that help a lot."

Marcia continues, "At the end of the day, it's all about building trust. The lawyers want to practice law. If you can gain their trust on the business side, they will defer to you one day. I'm going to email you a document with some helpful techniques I have learned over the years." A moment later, she clicks send and Angela receives this summary:

Change Management Techniques

- » **Involve leadership:** Secure early support and involvement from firm leadership to drive the change.
- » **Articulate a clear vision:** Clearly define the vision and measurable objectives for the change.
- » **Engage stakeholders:** Include stakeholders at every level in planning and implementation to build support and reduce resistance.
- » **Maintain open communication:** Keep communication channels open to address concerns and share progress.
- » **Provide training and support:** Offer necessary training and support to help employees adjust to the new culture and technologies.
- » **Implement performance incentives:** Use performance-based incentives to encourage productivity and innovation.
- » **Collect feedback and adapt:** Establish feedback mechanisms to continually refine and enhance the change process.
- » **Celebrate successes:** Acknowledge and celebrate milestones to sustain momentum and morale.



"Thanks Marcia, I love this. But help me understand how to apply this to my issue with Horace," says Angela, and the two begin to delve into the root issue: The firm's resistance to change is not solely about technology; it's deeply embedded in the culture. From day one, Horace has taught the lawyers that they need to focus on their cases, and nothing else matters.

"Angela, maybe we're attacking this from the wrong angle," Marcia suggests. "What if we first focus on fostering an entrepreneurial culture? Horace is worried that people aren't billing enough. What if you tied productivity directly to compensation? That might pave the way for technological adoption later on."

Inspired, Angela devises a strategy to spark a cultural shift within the firm, aiming to create a setting that rewards initiative, creativity and, most importantly, productivity.

Her strategy involves several pivotal actions:

- » **Engage leadership:** She develops tailored messaging for each key stakeholder in the firm, starting with Horace. Understanding the needs of each stakeholder, she emphasizes different factors for each, including how an entrepreneurial culture could boost motivation, client satisfaction and firm profitability.
- » **Develop a communication plan:** Angela communicates regularly and consistently and shares updates, success stories and challenges with everyone at the firm, encouraging a sense of participation and ownership.

- » **Offer training and development:** Angela gets buy-in on a mentoring program and marketing support to hone entrepreneurial skills among lawyers and staff, focusing on business development, client management and innovation.
- » **Introduce a performance-based compensation model:** Central to her plan is a new compensation model that incentivizes productivity, motivating lawyers and staff to innovate and take initiative.
- » **Implement feedback mechanisms:** To sustain the change, she plans regular feedback sessions, allowing everyone to express concerns, make suggestions and share achievements.

Soon after, Angela introduces the proposal to Horace as if it were his idea from the beginning. "Remember how you said you wished people would bill more hours? This gives everyone the incentive to do that." Horace's skepticism begins to soften. "Alright, Angela, let's see how this goes. But remember, our reputation and principles have brought us this far. We can't forget that."

Angela leaves the meeting with Horace and breathes a deep sigh of relief. She has a chance to make things better.




LEARN MORE ABOUT CHANGE MANAGEMENT

For more tips on change management and how to gain buy-in from those at your firm, check out the May 2024 *Legal Management* article, "How to Usher in Change at Your Law Firm (and Not Scare Staff)," along with the *Legal Management Talk* episode, "Change Management Techniques for Law Firms," featuring Catherine Alman MacDonagh, JD. You can also read the first three chapters of the *Linchpin* at leanlaw.co/Linchpin.

ABOUT THE AUTHOR

Gary Allen, Esq., is a Founder and Head of Operations at LeanLaw, a legal timekeeping, invoicing and reporting software company, as well as a partner at Givens Pursley LLP where he has practiced law for 30+ years. He was only three years out of Stanford Law School when the firm he was working for imploded. It happened again three years later. He was left without a job. Those experiences created a passion in Allen to help law firms be better businesses, with efficient operations, streamlined financial management and a laser focus on profitability.

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“Over time, as we gained a deeper understanding of our clients’ diverse needs, we strategically expanded our practice areas to [also] include litigation, bankruptcy and family law.”

4 Ways to Gain a Stronger Perspective of Clients’ Needs

If your firm is only focusing on current legal service requests, you could be missing out on chances to assist clients.

In today’s competitive legal services market, thoroughly comprehending how clients operate can be critical. More than a third (39%), according to a Wicker Park Group survey, say understanding their business and industry is their top criteria for selecting a law firm or lawyer.

It can also strengthen firms’ relationship with clients. Eighty-three percent are willing to consider hiring a law firm they’re already working with to provide additional legal services.

Firms, however, don’t seem to be taking full advantage of the opportunity. In 2018, 42% of clients said law firms’ efforts to provide additional expertise exceeded their expectations. Today, only 20% feel that way.

If your firm could benefit from reevaluating how it caters to clients, potentially implementing some of the following approaches may be helpful.

1. MAINTAINING TARGETED COMMUNICATION

After appraising new clients’ current needs during the intake process, pursuing regular contact can position a firm to find out about upcoming plans that might require additional legal services.

The Law Office of Min Hwan Ahn decided to augment its offerings after a client the firm had been providing immigration law services to reached out about corporate formation and contract guidance for a new venture.

“This conversation sparked the realization that many of our clients had similar needs, leading us to expand into business law,” says Pennsylvania attorney Min Hwan Ahn. “Over time, as we gained a deeper understanding of our clients’ diverse needs, we strategically

“Whether it’s a legal service or a car dealership operation, the principle remains the same. Listen, understand the core issue and address that directly and effectively, with as much precision and conciseness as you can.”

expanded our practice areas to [also] include litigation, bankruptcy and family law.”

Understanding the specific concerns clients have can also help law firms more effectively underscore their value proposition.

Before launching the David J. Greiner Law Corp in 2022, David Greiner, who was admitted to the California Bar in 2003, served as the president of automobile dealership for two decades — where he found identifying and emphasizing the aspects of a deal that matter most to clients can enhance their satisfaction level.

For instance, Greiner was negotiating the purchase of several vehicles that were being tailored to meet a company’s specific operational needs. He knew the organization felt a seamless transfer of service agreements after the sale would be necessary to maintain uninterrupted service delivery to its customers — so he included data and case studies in the business proposal that highlighted the dealership’s track record of executing smooth transitions.

“Whether it’s a legal service or a car dealership operation, the principle remains the same,” he says. “Listen, understand the core issue and address that directly and effectively, with as much precision and conciseness as you can.”

2. UTILIZING EXTERNAL RESOURCES

Greiner says being involved in automotive trade associations and conferences helped his dealership employees keep up with regulatory changes, consumer demands and technological trends. He has also encouraged the attorneys in his law firm, which has a focus on real estate and business law, to join real estate organizations.

“These associations help by hosting regular seminars and workshops on local property laws and zoning regulations,” Greiner says. “They also provide newsletters and updates that keep us informed.”

In addition to research tools such as industry publications and legal databases, ongoing relationships with business consultants and other professionals have helped Ahn’s firm anticipate new legal service needs.

After accountants and financial advisors mentioned their clients were becoming increasingly worried about financial losses, reputational damage and other possible data breach consequences, the firm decided to leverage its relationships with cybersecurity consultants who Ahn felt could provide his clients with customized support.

The consultants conducted thorough assessments of clients’ existing systems, identified potential vulnerabilities, recommended appropriate security measures and provided ongoing monitoring to ensure the implemented safeguards were effective.

Ahn’s firm assisted clients with the legal aspects of data privacy, helping them navigate complex regulations and draft the necessary policies and contracts. The feedback he’s received has been overwhelmingly positive.

“Our clients gained access to a team of legal and technical professionals who worked together to address their data privacy and cybersecurity needs,” Ahn says. “They appreciated our proactive approach [to] identifying and addressing their concerns, as well as our ability to connect them with the right experts to meet their specific needs. [It] not only strengthened our relationships with existing clients — but also attracted new clients who valued our commitment to providing comprehensive and innovative solutions.”

3. FOSTERING INTERNAL RESOURCES

Both clients and attorneys believe outside counsel’s ability to demonstrate its business savvy is one of the most important aspects of a law firm’s value proposition, according to a survey conducted by Thomson Reuters.

To ensure the value the firm provides is accurately being conveyed to clients, some have created a client services or experience group — which appears to be a viable strategy. More than half of large and midsized law firms classified their client services team as a very or somewhat effective marketing and business development activity in another Thomson Reuters survey.

The client value program national law firm Troutman Pepper launched several years ago, Troutman Pepper Plus, essentially combines various firm capabilities to support the client experience

“We always try and make it clear that this isn’t just an exercise for us to collect some insights and never act on it; we want to find out what’s working well so we can institutionalize those practices. We want to see if there are any issues with the service delivery.”

team’s work analyzing litigation trends, clients’ position in the market and what issues they’re facing, according to Director of Client Experience Erin Murphy.

“We say the client experience team is the tip of the spear,” Murphy says. “We have an innovation team who can help build custom technology solutions, a dedicated function that can help us design pro bono opportunities that are of interest to our clients so they can work alongside attorneys to benefit their communities. Clients [are] engaging with us to see what else we can do for them besides exceptional legal services.”

In 2023, the firm, which has more than 20 offices across the United States, launched a daylong summit event for its clients’ legal operations professionals.

“They’re the ones who are driving efficiencies in law departments,” Murphy says. “If a company is going from 50 outside counsel firms to 10, the legal ops team is running it. We found they were a somewhat underserved segment of our client base; our attorneys were mostly interfacing with the lawyers in the law department.”

At the firm’s summits, which to date have been held in Atlanta and Philadelphia, participants may collectively discuss how to undertake an upcoming initiative, or their thoughts on generative AI.

“We’re purposeful in how we designed the programming,” Murphy says. “It’s not folks just sitting in a room and listening. It’s really about building a community amongst the legal ops folks. That’s allowed us really great insight into what our clients are doing operationally — which we can bring back to our lawyers and say, ‘This is what you might have to do from a service perspective to address what we are seeing on the in-house side.’”

Some law firms may be hesitant to add a client services team because they tend to cost, not produce money. Often, marketing and business development employees at firms are tasked with client experience duties, instead of it being a dedicated function, according to Murphy.

“The challenge [for the industry] has been explaining to lawyers what that function is or could be,” she says. “We’re focused on making those relationships stronger; that, in the end, drives revenue.”

4. ACQUIRING FEEDBACK

The Law Office of Min Hwan Ahn sends quarterly surveys via email to gauge clients’ satisfaction and any areas where the firm can improve. The surveys may include open-ended questions — such as, “How can our firm better support your business goals moving forward?” — to encourage clients to share their needs and plans.

By uploading the thousands of client surveys and interviews Troutman Pepper has conducted to a tech platform, the firm has been able to draw trends-based information from the data.

“[It] really provides some insights across industries [and] clients on their issues of concern — drivers when purchasing legal services, things that they like, things that they don’t like,” Murphy says.

Information the firm has gleaned over the years has led to changes in process areas such as billing.

“We’ve been very purposeful in how we train our attorneys about communicating regarding costs and budgets because the data shows us — our own data, as well as industry-wide data — it’s a hot topic for clients,” Murphy says.



While some firms may be hesitant to reach out for feedback, the notion that clients are too busy to provide any is a misconception, according to Murphy.

“They’re willing to make the time when they find it’s a benefit to them,” she says. “We always try and make it clear that this isn’t just an exercise for us to collect some insights and never act on it; we want to find out what’s working well so we can institutionalize those practices. We want to see if there are any issues with the service delivery.”

Ultimately, Murphy says the intent is to solve a client’s problems, even if they’re primarily internal — such as struggling to manage a large number of contracts, something Troutman Pepper helped a pharmaceutical client remedy by building it a custom platform.

“They’re able to track their progress — who it’s assigned to, where it is in the process — then report to folks outside of the legal department what came in this week, went out, is still in the queue,” she says. “When we explain to clients how we can save them time, make them more efficient, make their experience better, they’re always willing to have a quick call with us to figure out what we can do for them. It’s all to make their lives easier.”

ABOUT THE AUTHOR

Erin Brereton is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

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How to Support Co-Workers Through Trauma

Demonstrate empathy and active listening to foster support and understanding.

Trauma is not uncommon at law firms.

Sometimes, a collective tragedy hits close to home, like the recent violence that unfolded in Las Vegas when an attorney killed two during a custody dispute hearing before turning the gun on himself.

“Many people experiencing trauma will have an inability to concentrate as flashbacks and intrusive thoughts fill their minds. This can make focusing on work difficult.”

Other times, trauma comes from the very nature of the work. Many lawyers and legal support staff listen to harrowing stories their clients have gone through — stories of rape, abuse, murder and neglect. Those stories are vicariously felt throughout the trial and remain decades after not only for the client but for those handling the case.

“Even years later, I can think back on what a client told me, and I get chills. What she went through was awful and I listened to every detail,” says Charlene Cabral, an attorney with the Law Offices of Charlene D. Cabral. “We were both crying. Her story helped me work harder and fight for the justice she deserved. Her case and what happened to her was horrible but many of my cases are stories of heartbreak and trauma.”

So what can you do to support legal staff through trauma? And what are the signs?

First, it helps to understand what trauma is: It’s an emotional response to a disturbing, terrifying or life-threatening event. The event itself can lead to stress that dissipates over time. When the stress is severe and continues to linger, it can lead to post-traumatic stress disorder (PTSD). That said, not all trauma leads to PTSD.

The National Institute of Mental Health defines PTSD as “a disorder that develops in some people who have experienced a shocking, scary or dangerous event.” The event itself may have you question if your life or the lives of others are in danger. Most people are familiar with PTSD as attributed to those who have experienced combat. Yet PTSD can happen to

“Trauma is something that someone goes through; it’s not who they are. It is an experience or a set of experiences that they’ve gone through and have had to endure and work through.”

anyone who has experienced or witnessed a traumatic event like a death, a terrible car accident or domestic abuse. Life-threatening events such as natural disasters or sexual assault in childhood or as an adult can also lead to PTSD.

When stress levels rise during the event and are coupled with a lack of sleep — a frequent reaction — these factors can increase the likelihood of PTSD.

There are several types of trauma:

- » Acute trauma happens when the event is sudden and severe and leads to immediate emotional distress. After six months of experiencing symptoms, it is then classified as post-traumatic stress syndrome.
- » Chronic trauma occurs when there is an extended period where persistent stressors exist such as severe toxic work environments.
- » Complex PTSD or CPTSD is categorized by more than one traumatic event within one’s lifetime or a prolonged series of events.
- » Secondary trauma is caused when a person has indirect exposure to a traumatic event, such as hearing someone’s stories or witnessing a person’s strong emotions related to a traumatic event.

RECOGNIZING SYMPTOMS OF TRAUMA THAT AFFECT WORK

Many people experiencing trauma will have an inability to concentrate as flashbacks and intrusive thoughts fill their minds. This can make focusing on work difficult. People working exceptionally long hours or multiple jobs often do so to avoid focusing on the mental pain they experience.

Other symptoms include memory impairment and challenges with decision-making. Nightmares and insomnia are common symptoms that can lead people to feel groggy or fall asleep at work. A person may appear disengaged from the team when in fact they are exhausted. At times, people can have emotional outbursts and irritability that lead to poor relationships with co-workers, causing conflict in the workplace. Low-level aggression can create fear and mistrust. This can cause a negative company culture and low morale if gone unaddressed.

Fear, anxiety and depression may take hold and the person who experiences trauma is unable to express how they feel or hide their feelings and put up a front. Some people feel the effects somatically — they may experience pain like headaches or have gastrointestinal issues causing missed days at work.

All these issues lead to reduced productivity individually and companywide. Marni Chanoff, MD, Founder and Chief Executive Officer of Joy In Health, says that people with PTSD may struggle in the workplace because “there is an internalization of the trauma they’ve experienced, that somehow their trauma informs how they see themselves. There can be challenges with esteem, confidence and even in a deeper way, inherently being able to trust themselves — trusting both within the environment and trusting co-workers can be quite challenging,” she says.

WHAT CAN YOUR FIRM DO TO HELP?

It’s important to note that PTSD has mental and physical challenges that if untreated can have mental health consequences. If you, one of your staff members, or someone you know displays symptoms of trauma/PTSD, or if symptoms worsen, seek the advice of a qualified professional.



The following tips are meant to offer guidance on how to build a supportive work environment for legal staff:


1. **Have an Employee Assistance Program (EAP)** — and then encourage staff to use it. This vital resource provides a confidential channel to access and report traumatic incidents. Additionally, they can provide mental health resources to employees who have experienced a traumatic event and can assist in finding the right therapist.
2. **Make sure personal time off is available** for medical and therapy appointments. These appointments chip away at personal time off, making employees hesitant to take time when needed to address health care concerns. Working with employees to manage time off and create flexible schedules permits important self-care appointments and will produce decreased absenteeism and increased productivity.
3. **Offer training on trauma** that can support the entire office and provide ways to work with people who have experienced a traumatic event. Providing resilience-building programs will help employees cope with adversity and stress. This in turn fosters a culture that values and promotes well-being and mental health.
4. **Build an environment that welcomes open communication** so employees feel comfortable voicing their experiences. Supervisors and leaders should demonstrate empathy and active listening to foster a sense of support and understanding. That said, wait for a person with a traumatic past to be ready to tell their story. Listen and respond with “I’m here for you”; “I’m sorry they hurt you”; “It’s not your fault”; and “I’m proud of you.” It is important to avoid discrediting the person and their experience. Your role is to support the person to get help and to create a safe work environment.
5. **Encourage an employee to seek treatment** — it’s paramount to recovery. Be respectful of their process, take their lead and allow them to disclose as little or as much as needed. All the while being sure to hold confidentiality as it is their story to tell.

Beyond seeking professional help, self-care is of utmost importance, too. Offering workshops on practices like

meditation, yoga and stress management can be crucial to helping colleagues work through trauma.

Knowing the signs of trauma and the symptoms of PTSD can help you determine the next steps to take in helping a co-worker. With empathy and compassion, you can be the guiding light that helps a co-worker or client through difficult times.

“Trauma is something that someone goes through; it’s not who they are. It is an experience or a set of experiences that they’ve gone through and have had to endure and work through,” says Chanoff. “[Trauma] can be extremely painful, hard and challenging, but a lot of growth, wisdom and strength that can come of it may be very beneficial to employers and other employees.”





SIGN UP FOR MENTAL HEALTH FIRST AID

Conversations about mental health can be difficult to start. But just as CPR helps even those without clinical training to assist an individual having a heart attack, Mental Health First Aid (MHFA) prepares participants to interact with a person experiencing a mental health challenge or crisis. Mental Health First Aiders learn a five-step action plan that guides them through the process of reaching out and offering appropriate support. ALA offers this training from the National Council for Mental Wellbeing every quarter. Check your inbox for more details or visit alanet.org/mhfa.

ABOUT THE AUTHOR

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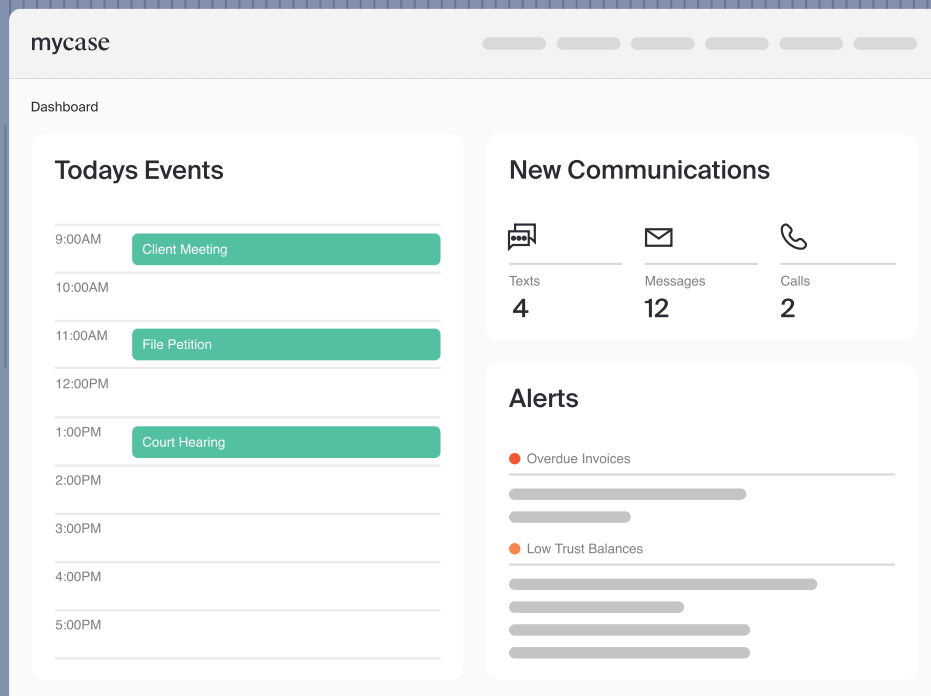
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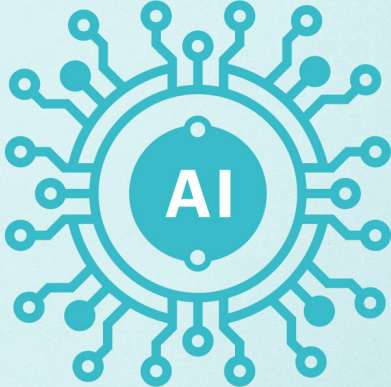
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“Artificial intelligence itself does not contain bias; however, the data it is trained on absolutely can contain bias and could cause adverse selection.”

AI and the Future of Hiring

Does artificial intelligence help or hurt bias when it comes to hiring?

It stands to reason that using artificial intelligence (AI) in the hiring process would eliminate biases. After all, a machine doesn't have the preconceived notions that humans have baked into their subconscious.

Or can it?

In 2023, the U.S. Equal Employment Opportunity Commission (EEOC) settled its first-ever AI-based hiring discrimination case with iTutorGroup Inc., a Chinese online education platform that is alleged to have programmed its recruitment software to screen out older job candidates.

Following this EEOC decision, providers of AI hiring tools and employers utilizing these tools may be looking closer at whether the safeguards applied to AI technology help — not hinder — their recruitment efforts.

“It is unrealistic to think there won't be bias in the data set. You can't be 'free from bias,' says John Boyce, Head of People Development at AMSOIL, Inc. “The best you can do is get very transparent about the biases that are in the data set and try to understand the methodology used in sampling and building the algorithm.”

AI tools are not thinking and creating independently — yet. The AI tool requires training on search criteria, the information to collect and how to fulfill replies. Currently two methods are employed to train AI: One is data scraping, using external data publicly available, and the other uses internal, historical data only.

“Artificial intelligence itself does not contain bias; however, the data it is trained on absolutely can contain bias and could cause adverse selection,” says Matthew Spencer, Co-Founder and Chief Executive Officer of Suited, Inc., an AI-based assessment provider

“AI systems inherently reflect the values, biases and ethical considerations of those who develop and train them. While we can design AI to operate within predefined ethical guidelines, its ability to be ‘more ethical’ is limited by the scope of its programming and the data it’s trained on.”

of supplementary data to law firms regarding candidate behavioral traits and relevant cognitive skills. “A key focus of any hiring tools using AI needs to be centered around training the models on well-defined and fully understood data sets.”

For example, Spencer says solutions with data trained on large language models or other types of generative AI (which are two newer technologies) are often trained on massive data sets, the content and relationship of which is not fully understood. “The result can be outputs that are inconsistent, unexpected and unexplainable. Alternatively, tools that leverage machine learning technology (a much more understood form of AI) and are often trained on defined data sets, result in consistent, expected and explainable outcomes.”

You have heard about ChatGPT — which is a large language model — hallucinating. These hallucinations result when artificial intelligence systems generate outputs that are not grounded in reality and are unexpected, or do not correspond to the input data, creating inconsistencies. AI-produced hallucinations can arise due to limitations in the training data, model architecture or optimization processes, causing the AI to produce such unexpected or illogical outputs.

Concerned over AI algorithm use, in 2021 the EEOC launched its Artificial Intelligence and Algorithmic Fairness Initiative to ensure Automated Employment Decision Tools (AEDT) comply with federal civil rights laws. New York City also enacted Local Law 144, which prohibits employers and employment agencies from using an AEDT in New York City unless they ensure a bias audit was done and provide required notices. The law was enacted in 2021, but enforcement began on July 5, 2023.

AI AND THE HIRING PROCESS

Boyce has not moved AMSOIL into AI for hiring because of concerns regarding transparency and not expecting AI systems to be more ethical than the people who develop the systems. “Ethical decisions cannot simply adhere to a predefined series of rules and procedures. Novel situations will come up and I don’t trust AI to make the right ethical

decision, especially with its inability to take responsibility for decisions. Humans may be less accountable saying, ‘It’s the algorithm, not me.’ That is a problem for me.”

Given the unique requirements of many roles and responsibilities in the legal community, more novel situations are often the norm. Yaima Valdivia, Principal Software Engineer at Vercara, believes that by incorporating a wide variety of data that captures the full spectrum of potential candidates — including those considered outliers — AI may be trained to handle unusual cases.

Valdivia notes that diversity in training helps the AI learn to evaluate candidates fairly and without undue bias toward the majority. By including provisions for exceptions, the AI system may accommodate a broad range of candidates, ensuring that the system is inclusive. “Failing to account for anomalies can lead to a system that unfairly discriminates against candidates who do not fit within a narrow set of parameters, undermining the fairness and integrity of the hiring process.”

As the firm’s hiring process is assessed and evaluated, so should the tools designed to assist in that process. AEDT tools should not be exempt from preacquisition assessment or ongoing audits. For example, in Suited’s audit process, Spencer indicates that every machine-learning driven candidate-scoring model that Suited develops is examined by an independent auditor, and the audits are conducted in compliance with New York City Local Law 144 on at least an annual basis.

“The audits for law firms are conducted by scoring a pool of more than 14,000 law candidates who have completed Suited’s assessment as part of our clients’ hiring processes,” says Spencer. “Each candidate is scored using the individual AI-model, and the scores are compared across demographic groups to determine if the algorithms are scoring candidates differently by demographic groups, in accordance with the formula set out by NYC LL 144. We also test every model against the EEOC prescribed formula for testing for adverse impact.”

Suited provides the audit reports to their clients, to uphold that no adverse impact is being caused. The report also provides documentation to clients where law or jurisdiction regarding the use of AI tools is applicable.

AI tools make the hiring process more efficient, but is time saved worth the real or perceived lack of communication and interpersonal requirements of a law firm? Attorney Heather Parker of the Parker Law Office, LLC, has not considered implementing AI. Parker's main reason is that the practice area is very interpersonal and is concerned "there would be a lack of genuineness felt by the candidate or that the communication would not 'sound like me.' We each have a style and uniqueness about us, and I would not want that to be lacking in communication with someone who might ultimately deal with my clients and the rest of my team," she says.

AMSOIL and Boyce are not rushing to utilize an AI tool in hiring, believing that the ethical issues are significant and not enough attention is being paid to them yet.

Given Boyce's concerns, can we expect AI systems to be more ethical than the people who develop the systems or than the people who input the data?

"AI systems inherently reflect the values, biases and ethical considerations of those who develop and train them. While we can design AI to operate within predefined ethical guidelines, its ability to be 'more ethical' is limited by the scope of its programming and the data it's trained on," says Valdivia.

The moral responsibility of the AI tool provider is significant, according to Valdivia. It includes ensuring that the AI is developed with an awareness of potential biases and that efforts are made to mitigate these biases through diverse data sets and continuous monitoring. "Providers must also adhere to ethical guidelines prioritizing fairness, transparency and accountability in AI systems," she says.

As part of the ethical considerations, Valdivia believes that transparency is crucial, indicating the candidate be advised that AI is involved in — or is making — the hiring decisions. This transparency respects their right to understand how decisions about their candidacy are made, and to withhold this information denies candidates the opportunity to provide informed consent and potentially to challenge decisions that they believe to be unfair.

GOING FORWARD

AI-assisted hiring is only one piece of the larger conversation around the use of AI in organizations. So where is AI hiring going and how do we prepare? Valdivia agrees that as AI advances, organizations, developers and legal professionals must work together to ensure that AI tools

are used to enhance fairness and inclusivity in hiring processes. "Ethical AI use in hiring benefits candidates and enriches organizations by promoting a diverse and capable workforce."

Spencer supports the benefits to candidates and organizations. "When properly built and deployed, AI tools can have tremendous positive impacts that create more equitable and effective hiring processes. They can help firms make more accurate and less biased hiring decisions, resulting in increased performance, reduced attrition, greater diversity and improved efficiency."

In the implementation and use of an AI tool, it is important to recognize that AI is your assistant in the hiring process and does not replace human intervention and interaction. As author Adam Grant indicates in his latest book *Hidden Potential: The Science of Attaining Greater Things*: "An algorithm is an input to human judgment – not a substitute for it."

When used with transparency, and the data sets and output are frequently tested, AI may be an additional resource in the hiring process. Are you ready for AI to be your assistant in the hiring process?



GETTING THE MOST FROM AI IN LEGAL

Want more AI conversation? Tune in to *Legal Management Talk*, where we recently talked with Kriti Sharma, Chief Product Officer of Legal Tech at Thomson Reuters, where we discuss AI software, what the regulation landscape looks like and how AI will change the future of talent recruitment. Check out Part 1 and Part 2 to hear the full conversation. alanet.org/podcast

ABOUT THE AUTHOR

Madeline Parisi started Madeline Parisi & Associates LLC in 2013, providing global business consulting and training services. She has authored several articles and co-authored the ALA White Paper, "Assessing, Managing and Mitigating Workplace Violence: Active Shooter Threat." She is currently co-authoring the four-book series *From Street-smart to Web-wise®: A Cyber Safety Training Program Built for Teachers and Designed for Children* for grades K-8 due for worldwide release in 2024.

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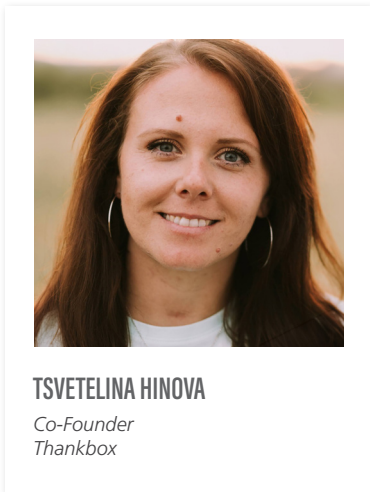
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Retaining the Humans in Human Resources

The growth of artificial intelligence (AI), the COVID-19 pandemic, and the accelerating trend toward globalization have combined to usher in an epochal shift in working practices — arguably the most significant since the industrial revolution.

The traditional office model, where employees collaborate in close proximity, has given way to more atomized workforces, with individuals operating in isolation and communicating remotely. Machines are increasingly assuming roles previously performed by humans, transforming the nature of work itself.

While the economic advantages of these changes are evident, the repercussions on human relationships, integral to the fabric of labor relations, are profound and often unanticipated.

Governments, law firms and organizations now face the urgent task of preserving and fostering human connections to sustain creativity, cooperation and collaboration.

THE IMPACT OF AI ON WORKFORCE ATOMIZATION

AI is no longer a distant prospect; it's actively reshaping industries and economies worldwide. With its capacity to emulate human intelligence, machine learning has the potential to revolutionize industries on an unparalleled scale.

Already large language models, such as ChatGPT and its advanced counterparts, are altering the landscape of business operations, disrupting traditional roles.

The adoption of AI technologies may create a hierarchy among law firms, widening the gap between those harnessing AI's power and those not. While this technology offers remarkable opportunities, it also presents substantial challenges for society and workforces.

“Law firms must actively address these challenges to ensure that the future of work is not devoid of the meaningful human connections that define a thriving workplace.”

THE ROLE OF GLOBALIZATION IN THE TRANSFORMATION

Simultaneously, the ongoing shift toward globalization has further amplified the disruption of traditional working structures.

The ability to collaborate across borders has opened up new possibilities, enabling law firms to assemble teams with members spanning different time zones and continents.

This physical separation of individuals raises challenges in maintaining the interpersonal connections that were once fostered through shared office spaces.

Colleagues who previously worked side-by-side in the same office are increasingly being replaced with workforces that are dispersed across different countries and continents, in which people can form professional relationships without ever meeting face-to-face.

While this has undoubtedly increased efficiency and flexibility, it has also disrupted the social fabric of the workplace, impacting the spontaneous interactions that often fuel creativity and collaboration.

Most workers have taken positively to home working, particularly those who face long and tiring commutes to the office. While some law firms have welcomed remote working as a way of reducing overhead costs — particularly in law firms in more expensive/higher rent cities — more firms are encouraging some or most of their staff to be in person most of the time.

This is the point at which opinions start to diverge. Despite efforts to bring employees back to the traditional office setting, law firms are facing unexpected hurdles.

PRESERVING HUMAN RELATIONSHIPS IN THE DIGITAL ERA

In the evolving landscape of modern workplaces, where remote and hybrid work models are becoming increasingly prevalent, maintaining human connections and fostering a sense of community among employees poses a unique challenge. Employers can play a pivotal role in fostering a sense of connection among remote workers.

Here are some steps they can take to encourage and forge greater human contact and relationships:

Virtual team-building activities: Organize regular virtual team-building activities to recreate the camaraderie of in-

person interactions. This could include virtual games, quizzes or collaborative projects.

Scheduled videoconferencing: Prioritize face-to-face communication through videoconferencing platforms. Regular video calls can help bridge the emotional gap created by physical separation.

Digital collaboration and recognition platforms: Implement digital collaboration tools that facilitate real-time communication and project management. As well as enhancing teamwork and providing a shared space for employees to collaborate, they also assist employers in recognizing and celebrating individual achievements and events across the organization. Sharing birthdays, anniversaries, maternity events, long service landmarks, etc., is essential in retaining a sense of togetherness and community.

Flexible work hours: Allow flexible work hours to accommodate different time zones. This ensures that employees can connect with colleagues when it is most convenient for them, promoting inclusivity.

Mentorship programs: Establish mentorship programs that pair remote employees with experienced colleagues. This not only facilitates knowledge transfer but also nurtures meaningful professional relationships.



Virtual coffee breaks: Encourage informal virtual coffee breaks where employees can discuss nonwork-related topics. These casual interactions mimic the spontaneous conversations that occur in physical office spaces.

Well-being initiatives: Prioritize employee well-being by implementing initiatives that address mental health and work-life balance. A healthy and content workforce is more likely to engage in positive relationships.

Cross-functional projects: Create opportunities for employees from different departments to collaborate on cross-functional projects. This fosters a sense of unity and understanding across diverse teams.

Recognition programs: Implement recognition programs to acknowledge and celebrate individual and team achievements. Positive reinforcement enhances morale and strengthens interpersonal bonds.

Open communication channels: Establish open and transparent communication channels to address concerns and foster a culture of trust. Remote employees should feel heard and supported, reinforcing a sense of belonging.

MOVING FORWARD

AI, the pandemic and globalization have combined to force the modern workforce into uncharted territory. The atomization of workers — while bringing economic benefits — poses challenges to the essential human relationships that underpin creativity and collaboration. Law firms must actively address these challenges to ensure that the future of work is not devoid of the meaningful human connections that define a thriving workplace.

By implementing the suggested steps, employers can navigate this evolving landscape and embrace the advantages of technological advancements while preserving the richness of human interactions in the world of work.

Balancing the benefits of remote work with considerations of accessibility, diversity and happiness becomes imperative, and the adoption of a flexible hybrid model stands out as a step toward creating a work environment that accommodates various needs and circumstances.

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Tsvetelina Hinova is Co-Founder of Thankbox, an online card and cash collection service with its core offering being the collection of cash for special occasions.

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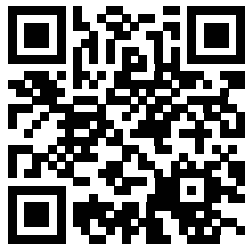
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JOHN C. SCOTT, CPA, AEP
*Partner in Tax
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“
When your legal administrator is wearing all the hats, the risk of burnout is real.”

Too Many Hats: Why Hiring a Virtual CFO Assists Your Legal Administrator

Legal management professionals in small to midsize firms are proficient in all trades. Required to perform multiple heavy lifts on a daily basis, they are often responsible for such diverse tasks as creating and maintaining the office culture, acting as a liaison between the office and various vendors, and setting up the client experience. Add to that the billing, collecting and bookkeeping, and they've got a to-do list that no one would envy.

Think about it this way: Your high-value legal administrator might be your highest value employee, especially if they have been with the firm for a long time. They've been around long enough and done enough tasks to know how the business operates on a microlevel, sometimes in ways even you might not know.

First impressions matter. In a service-based industry, the client experience is the business, and your legal administrator is a critical touchpoint. They set the tone for engaging with prospective, new and existing clients, both directly and indirectly, by setting the tone for the office as a whole. They are scheduling office happy hours, arranging lunch deliveries, and generally doing an untold amount of invisible labor to keep the office running smoothly.

And then there's bookkeeping.

Legal administrators often serve as a one-person, in-house finance team. They keep up with bills — both accounts payable and receivable. And if clients don't pay on time? They're the ones on the phone, making sure that cash is still coming in.

This also means the administrator is reconciling the books on a monthly basis and presenting historical financial reports to the partners, which understandably takes some time after month-end. By the time partners get the reports — often weeks later — it's too late to make course corrections if there's something problematic, such as a dip in cash flow. This information is essential when you're trying to understand if you have the right amount of work in the pipeline, or if you need to bring in more business. It's also crucial to understand your real-time financial picture before deciding on the size of your partner distributions (or you risk over-distributing and then needing to draw on a line of credit).

THE BENEFITS OF HIRING A CFO TO WORK WITH YOUR OFFICE MANAGER

When a legal administrator is wearing all the hats, the risk of burnout is real. Bringing in a specialized financial team provides your office manager with a partner, allowing them the bandwidth to concentrate on all the things you thought they would do originally, before they took on the financial piece. Even after you hire a virtual chief financial officer (CFO), the legal administrator will still be involved in the finances — but the full weight of that responsibility is off their shoulders.

By the same token, bringing in a specialized finance team also comes down to helping your business expand and grow. Part of growing and scaling your business means being intentional with who does what, and why.

When you hire a CFO to work with your legal administrator, you get:

» **Timely reporting:** If a firm waits a month to run the latest financial reports, then firm leadership is going off of information that was relevant four weeks ago. I've seen this happen: You might look at your cash account and see hundreds of thousands of dollars, but when you reconcile, you end up with a fraction of that amount. If, in the meantime, you've made an overly generous distribution, you risk running out of cash and needing to tap into your line of credit.

- » **Forward-looking financial reports:** Timely reporting is just the first step. You need to use your up-to-date reports to produce forward-looking statements that anticipate bumps in the road. That requires a specialized finance team, which goes way outside the realm of an administrator's skill set. Asking someone to master both is a recipe for burnout.
- » **Separation of duties:** It's considered best practice to have a third-party review account reconciliation for payables and receivables. When the same person in the office is issuing or depositing checks and reconciling the books, that leads to potential mistakes, mismanagement and, in the worst case, fraud. Often it falls to a partner to review these transactions, but again — if the person reviewing the books has other priorities, it's unlikely this will be done to standard.

When you hire an outsourced financial professional, expect a period of internal adjustment (or, let's be honest, growing pains) as your office learns to work with the new team and vice versa. But after onboarding, the legal administrator benefits from the ability to focus on the parts of their job that they do best. Because, at the end of the day, if you can't find and keep good people to work for you or serve your clients, all the bookkeeping in the world won't matter.

ABOUT THE AUTHOR

John C. Scott, CPA, AEP, is a Partner in Tax at Anders CPA + Advisors. With more than 30 years of experience, Scott leads the firm's legal industry efforts as a Virtual Chief Financial Officer. He offers dedicated resources, financial insight and critical thinking to address complex issues facing law firms, helping them be more efficient, competitive and profitable. Scott is an Accredited Estate Planner, Chartered Global Management Accountant and a Certified Public Accountant.

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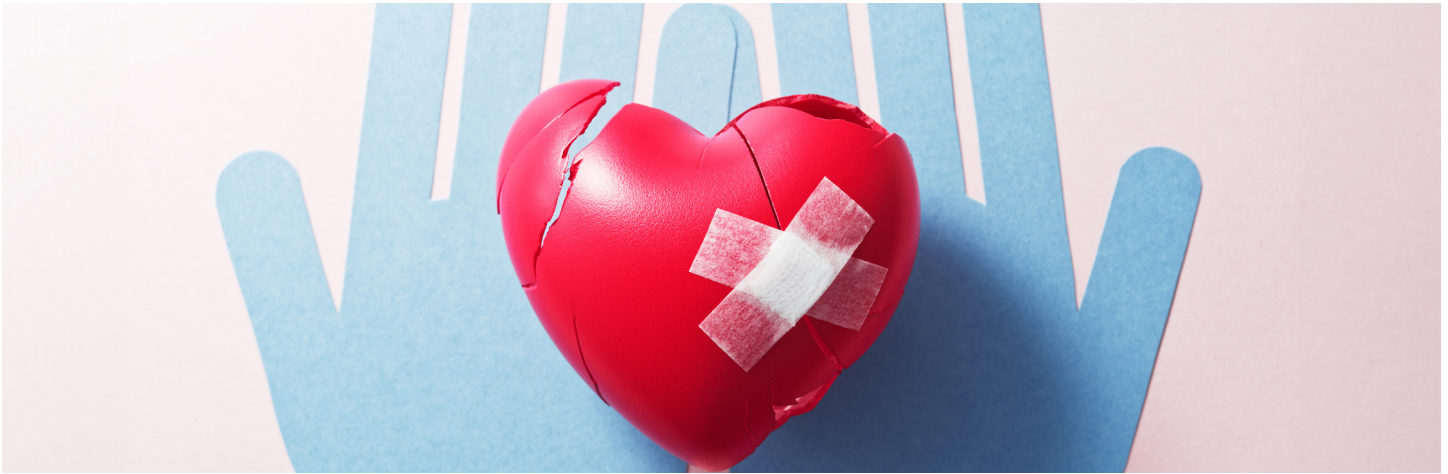
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GEORGE L. VERGOLIAS, PSYD, CTM
Chief Clinical Officer
R3 Continuum

“In response to high stress situations, humans tend to seek out information that restores a sense of control or assigns meaning to a certain event. When that information is absent, we fill in the resulting gap with a negative and dramatized version of what happened.”

Mastering Crisis Control: Top 5 Strategies for Legal Managers Facing Workplace Trauma

Legal managers may be experts in their area of law, but when a traumatic event impacts their workplace — such as a mass layoff, the death of a colleague or an act of workplace violence — there often is no playbook to work from.

Balancing employee care during a delicate and sensitive transition or event on top of other work responsibilities can feel overwhelming to even the most seasoned professional. However, by building a proactive strategy that considers five key steps, legal leaders can navigate a traumatic time with compassion, insight and efficiency.

1. Act Immediately

When a traumatic event occurs, it can often feel like the best course of action is a wait-and-see approach. But years of trauma research indicates that the first three to seven days are crucial for people to begin adjusting to the traumatic event and shaping positive psychological habits that build resilience. Immediate support for employees is crucial — but don't stop there. It's important to provide a layer of assistance that extends all the way to those directly affected, including employees, clients or their families.

Disruptive event management (DEM) services are an important component of this immediate response during the first week following the event. Additionally, offering counseling services, arranging for medical assistance as needed, and taking steps to ensure employee safety should also be considered in the early days following the event.

2. Open the Lines of Communication

In response to high stress situations, humans tend to seek out information that restores a sense of control or assigns meaning to a certain event. When that information is absent,

we fill in the resulting gap with a negative and dramatized version of what happened. This is our evolutionary attempt to prepare for the worst, yet if this fear response remains active for too long it can create a distorted and dysfunctional pattern of thoughts and emotions.

It's vitally important for leaders to step up in these high stress situations and communicate honestly and openly with all stakeholders about the events that have occurred, while maintaining and respecting strict privacy and confidentiality. Initiating a dialogue to ensure employees know the facts about what happened and what support is available to them can provide much-needed context and understanding. Be willing to have these tough conversations — as difficult as they may feel, it creates authenticity during a time of chaos and confusion for all involved.

3. Consider the Legal Implications

In my many years of consulting, I've regularly observed that organizations can have unintentional blind spots when it comes to the legal risks of a traumatic event. With the whirlwind that can often take place following one of these events, it can simply be a business reality.

Legal leaders should understand and assess the potential legal liabilities or obligations the firm may have, take appropriate steps to mitigate risks, and address any issues that may arise down the line. Sometimes this even means partnering or consulting with other legal advisors to hear a different point of view and better identify vulnerabilities.

4. Move Forward with Employee Wellness

As important as it is to step up employee support immediately following a traumatic event, it's just as important to continue to create a supportive environment moving forward. Often, employees can "get back to work" surprisingly quickly post-event, but then falter weeks or even months later as they try to sustain their previous level of performance. In essence, their emotional stamina begins to run out.

By understanding that employees move at their own pace, legal managers can build and implement a permanent mental wellness program with resources available year-round, prioritizing holistic employee health and fostering a supportive and nurturing workplace culture.

5. Ensure Support Is Available How and When Employees Need It

Continue to promote the resources available to employees and ensure they know what's available to them, and when. For employees with demanding personal and professional schedules, think of ways you can incorporate well-being tools into a program with availability outside of the traditional 9-to-5, and if possible, look to build flexibility into their work life. That could mean encouraging them to take their allocated paid time off or be able to work on their own time, in-office, hybrid or virtually.

Beyond flexibility, develop a comprehensive plan for providing continued support to employees, such as access to employee assistance program (EAP) support, access to tailored counseling services, training on coping strategies and periodic check-ins to assess well-being as needed.

Nobody wants to think of having a traumatic event in the workplace, but having a roadmap to follow when one does occur will go a long way toward easing your burden as legal managers. With these strategies in place, your firm will be prepared, adaptable and responsive when disruption strikes today and into the future.

ABOUT THE AUTHORS

George L. Vergolias, PsyD, CTM, Chief Clinical Officer at R3 Continuum, oversees all R3's clinical service areas. He leads R3's Leadership Support, Clinical Risk and Workplace Violence programs, and has directly assessed or managed more than 1,000 cases related to threat of violence or self-harm, sexual assault, stalking, and communicated threats. He brings more than 20 years of experience as a forensic psychologist, certified threat manager and executive coach to bear to help leaders, organizations, employees and communities heal, optimize and ultimately thrive before, during and after disruption. As an expert in restoring and fostering workplace resilience, Vergolias is a sought-after international speaker and entrepreneur.



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Discovering the Difference in Aurora



ALA's 2024 Annual Conference & Expo brings industry leaders to Colorado

A **BIG** thank you to the more than 1,000 attendees and over 160 exhibiting companies at the 2024 Annual Conference & Expo in Aurora, Colorado! We hope you walked away with plenty of inspiration, new connections and cutting-edge solutions to enhance your career and put into practice at your law office.

With the close of the conference, new volunteer members officially join ALA's standing committees, the new Chapter Resource Team and the Board of Directors. President Amanda R. Koplos, CLM, CPA, and the 2024–2025 ALA Board took office. We'd also like to give a special thanks to the 2024 Annual Conference Planning Committee for all the work they did to make Aurora a huge success!



The 2024–2025 ALA Board of Directors

From left to right: Sarah E. Cramer, Director; Jessica L. VanTroost, Director; Elyssa A. Goldstein, CLM, PHR, SHRM-CP, Director; Daniel P. Atcheson, Director; Travis C. Armstrong, CLM, CPA, President-Elect; Geoffrey M. Williams, CLM, MBA, MDiv, Immediate Past President; Amanda R. Koplos, CLM, CPA, President; Eryn Carter, CAE, ALA Executive Director; Clara E. Onderdonk, CLM, Director; Angelina Angelov, CLM, MBA, Director; Jerry G. McPeake, MSLA, Director; Terri D. Moore-Natal, SPHR, Director; Ken Koehn, CLM, CPA, CMA, Director.

2024 Annual Conference Planning Committee

From left to right: Amanda R. Koplos, CLM, CPA, ALA President; Summer S. Jurells, PHR, SHRM-CP, Chair; Domicka L. Max, CLM; Dawn M. Donham, CLM; Andrea C. Stitt; Roberta A. Bauer; JaNae D. Martin; Geoffrey M. Williams, CLM, MBA, MDiv, ALA Immediate Past President



Congratulations to Our 2024 Award Recipients

On May 20, conference attendees gathered to honor ALA's award recipients at the Association Awards Gala. We appreciate all these members do to advance the legal management profession and our Association. Congrats to all!

SPIRIT OF ALA AWARD



While many ALA members contribute tremendous amounts of time and effort to the growth of the legal management profession and the success of ALA, recipients of the Spirit of ALA award are individuals who have in their careers demonstrated all of the following in extraordinary, consistent and significant measure: an unswerving commitment to professionalism; exceptional dedication to the advancement of law firm administration; a record of service to ALA that far exceeds normal expectations and also provides a model and inspiration for participation and involvement of others. This year's recipient is **Debbie Elsbury, CLM**. Debbie has been an ALA member since 2003, and in her 21 years of membership, she has held 41 different volunteer roles across the globe, from humble beginnings in her local chapter to the old regional structure, and ultimately as ALA President. Debbie is the President we only knew from the neck up because she led the Association during the pandemic, a time when all in legal leadership took on the role of safety director. Her innovative approach and commitment to member well-being showed what we already knew: she is a true leader. Through her leadership, members were able to virtually collaborate, have seamless communication and accomplish major goals that hadn't been done before.

Debbie's presidency always gave a voice and opened the floor for ideas and brainstorming with intrepidity, but she also left room for wild and wacky. Her leadership and counsel extended to each board member to listen and guide best practices in such a way they felt appreciative of the time spent. Debbie's impact has left an indelible mark on ALA and has set a new standard for adaptability, empathy and success in the face of adversity. Thank you, Debbie, for everything you've done!done before.

ELEVATE ALA AWARD

The Elevate ALA Award recognizes up to three recipients whose efforts in professional development, networking and visibility demonstrate advancement in the areas of educational content, member-to-member and member-to-business-partner relationships, and ALA's prominence in the legal community. .

The first recipient was the group of the **East Bay, Golden Gate, Orange County** and **Silicon Valley Chapters**. These four California chapters joined forces to promote diversity, equity, inclusion and accessibility (DEIA) by hosting in-person and virtual sessions on Legal Workplace Transgender 101: Changed Genders, Changed Perspectives led by trans activist and author Ellen Krug.



ELEVATE ALA AWARD *(continued)*

The final recipient was the **Gateway Chapter**, which implemented a joint ALA Gateway and Strategic Alliance Legal Forum and Business Partner Showcase, connecting their Strategic Alliance Partners with Business Partners and members. Congratulations to the Elevate ALA Award winners for their outstanding achievements!



CHAPTER AWARD

ALA's Chapter Awards are designed to recognize chapters that have created innovative initiatives and experienced success in various areas: in member value; in diversity, equity, inclusion and accessibility (DEIA); and in business partner relations. This year, awards were separated into small chapter and large chapter categories.



This year's small chapter recipient was the **Raleigh-Durham Chapter**, in the area of DEIA. The Raleigh-Durham DEIA team unveiled a new DEIA mission statement, hosted a presentation on how to create sustainable and inclusive system-wide culture changes, and committed to choosing minority-owned and women-owned businesses when purchasing chapter gifts. Raleigh-Durham also focused on student outreach by deepening relationships with Historically Black Colleges and Universities and bringing awareness to both their Diverse Student Membership Grant and the Foundation of ALA's Student Legal Career Scholarship.

The large chapter award in the area of business partner relations went to the **Boston Chapter**. They created "Pop-Up" Socials, which were informal gatherings at a chapter member's office for business partners and other members. They also continued to hold monthly "Coffee Connections" open to all members and business partners. As a result, Boston added approximately 20 new sponsors in 2023 — a growth of approximately 25% and \$100,000 in financial resources for programs and education. We salute your efforts in building long-lasting legal industry relationships.



The large chapter award for DEIA went to the **New York City Chapter**. This past year, ALANYC held an event called The Gathering, designed to be a meaningful discussion based upon the simple traditional concept of sharing a meal and engaging in diverse conversational topics. From that one concept, ALANYC has evolved its DEIA programming into three meaningful approaches: discussions over a meal; a book club purely discussing DEIA topics; and highlighting members and business partners in sharing their untold stories. Thank you for continuing to set a high standard in DEIA efforts.



CHAPTER AWARD *(continued)*



The **Puget Sound Chapter** was the large chapter recipient in the area of member experience. Their PSALA Connections Program was borne out of a need for community building and member-to-member networking. That program — now in its second year — creates connections, promotes belonging, and increases membership value for their members and business partners. Thank you for your outstanding dedication to your members!

AMBASSADOR EXCELLENCE AWARD

New this year, the Ambassador Excellence Award recognizes members who have provided an exceptional mentorship experience to an ALA member through the ALA Ambassador Program.

The first-ever recipients of this award are **Anna Scarpa** and **James L. Cornell III** (not pictured). Anna's mentee said this about her: "She always had uninterrupted time for me and was willing to stay on the topic of the meeting or handle an emergent issue that I was dealing with at the time. She guided me through the [Certified Legal Manager] process, which was very new to me and other ALA offerings that will help me in my new career. Anna is a true mentor as she is a coach, cheerleader and pushes you to become a better leader in your new role."

James' mentee offered these words: "His passion for sharing and gaining knowledge was infectious, and he was able to articulate the value of belonging to ALA in a way that resonated deeply with me. His dedication, knowledge and kindness have made a significant impact on my professional development and my involvement within ALA." Thank you to Anna and James for their willingness to mentor and welcome new members!



OUTSTANDING ASSOCIATION VOLUNTEER AWARD



Each year, the Board of Directors identifies members who have made significant contributions to the Association. This year, the Outstanding Association Volunteer awards went to **Stacey J. Ransleben, CLM**, and **Kara M. Brostron, CLM**.

Stacey is actively involved at all levels of the Association and within her numerous local chapters, and she is quick to jump in where needed. She has worn many hats, from Chapter President to Membership Ambassador to serving on the Annual Conference Committee last year, and even serving in short-term positions such as virtual roundtable moderator.

OUTSTANDING ASSOCIATION VOLUNTEER AWARD *(continued)*

As a member of the Gateway Chapter, Kara has gone above and beyond. Without judgment, Kara challenges the chapter to think of all the different impacts of a decision. Kara is also the Chair of ALA's Product and Services Review Committee, offering her time and effort to ensure ALA is providing the best tools to our members. Thank you both for being such valuable leaders at ALA!



NEXTGEN LEADER AWARD

The NextGen Leader Award recognizes individuals who demonstrate conviction, dedication, and the relentless pursuit of personal and professional excellence through their engagement, advancement and influence in early interactions with ALA.



The first recipient was **Erika A. Leavitt**. In her first ten months as the Houston Chapter's Social Media Chair, Houston's social media posts, engagements and interactions increased significantly and, as a result, so did the value of social media for the chapter. This past summer, she led a resume writing workshop and met one on one with each of the five Houston ALA Diverse Intern Scholars to provide input on their resumes to help prepare them for success. Erika is friendly and welcoming to all who interact with her and has had such an impact on the Houston Chapter that in December 2023, she was recognized as their Member of the Year.

The second award winner was **Juleana Piper, FRP**. Juleana joined the JaxALA Board in 2021 and is the current 2023-2024 President. In her short time at ALA, she has served the Jacksonville Chapter on the Quarterly Charity Committee, Business Partner Committee and Education Committee. Under Juleana's tenure, the Chapter won its very first Elevate ALA award for their social media efforts. Whether it is conducting board or chapter meetings, engaging their business partners, or making sure their chapter stays on course, Juleana has done a tremendous job organizing and keeping JaxALA on the road to success.



NEXTGEN LEADER AWARD (*continued*)



The third award went to **Ryan Hill**. From the moment Ryan joined the Golden Gate Chapter, his dedication and proactive approach were evident as he spearheaded numerous engaging finance programs that resonated well with our members. As Co-Chair of the Finance Education Committee for the 2023–2024 Board, Ryan has demonstrated exceptional initiative and expertise in advancing the chapter’s financial education goals. His strategic vision has been instrumental in creating and executing programs that enhance the knowledge and skills of our members in financial management.



PRESIDENTS’ AWARD OF EXCELLENCE

Named in honor of ALA’s Past Presidents, the Presidents’ Award of Excellence is a performance guideline used to encourage chapters to take effective and collaborative action in support of the Association’s mission to promote and enhance the competence of legal management professionals; improve the quality of management in law firms and other legal service organizations; and represent professional legal management and managers to the legal community and to the community at large. ALA recognized 41 chapters that have achieved this honor thanks to their hard work throughout the past year. They and their chapter leaders deserve a tremendous amount of credit and respect..

Arizona	First State	Middle Tennessee	Richmond
Atlanta	Gateway	Mile High	San Diego
Austin	Golden Gate	Minnesota	Silicon Valley
Boston	Greater Kansas City	New Jersey	South Florida
Calgary	Greater Los Angeles	New Orleans	Wisconsin
Capital	Houston	New York City	
Central Florida	Independence	Orange County	
Chicago	Jacksonville	Oregon	
Columbus	Las Vegas	Philadelphia	
Cyber	Maryland	Pittsburgh	
Dallas	Metropolitan Detroit	Puget Sound	
East Bay	Mexico	Raleigh Durham	



Complete details regarding ALA’s awards program can be found at alanet.org/about/awards-recognition.

SILENT AUCTION RAISES OVER \$18,000 FOR THE FOUNDATION OF ALA

The Foundation of ALA continued its Silent Auction at the 2024 Annual Conference to benefit the programs it supports throughout the year. Because participants were so very generous with their donations and Silent Auction bids, the Foundation raised over \$18,000 this year! These funds will be used to provide quality inspirational speakers at future David M. Brezina Memorial Sessions, the Susan L. French Emerging Leader Fellowship Program and a scholarship for students furthering their education in the legal field.



The Foundation's Board of Trustees

From left to right: Kira L. Hansen, Vice President; Karen Michelle Beasley; Kristie Lynn Manning, CLM, SHRM-CP, President. **Not Pictured:** Eryn Carter, CAE, ALA Executive Director; Monique N. Mahler, CLM, MSLA, SHRM-CP, Secretary; Julie S. Logan, SPHR, SHRM-SCP; Travis C. Armstrong, CLM, CPA, ALA President-Elect; Frederick J. Esposito, Jr., CLM, MBA, Treasurer.

Foundation of the Association of Legal Administrators *advancing knowledge, creating opportunities, touching lives*

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